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OFFICE OF FINANCIAL AND INSURANCE SERVICES
DEPARTMENT OF LABOR & ECONOMIC GROWTH
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COMMISSIONER

Memorandum

DATE: October 24, 2005
TO: All Continuing Education Providers
FROM: Tracy Lord Bishop
SUBJECT: Introduction

I would like to formally introduce myself to you and your organization. My name is Tracy Lord Bishop, Education Administrator for the State of Michigan. My appointment was effective May 8, 2005.

I have had the pleasure of working with some of you over the past several weeks and I look forward to working with all of you in the future. Whether you have a prelicensing or continuing education question or concern, please do not hesitate to contact me. My email address is tlbisho@michigan.gov, toll-free 877-999-6442, or directly 517-373-7228.

As I continue learning the prelicensing and continuing education programs, I will be looking at streamlining some processes and practices of both programs. Some of the changes for continuing education are House Bill 4421, when/if approved, will reduce CE hours from 30 to 24. Of the 24, three credit hours need to be in Ethics. The companies will be responsible for monitoring their producers' continuing education for the line(s) of authority he/she maintains. As OFIS establishes the Ethics guidelines for Michigan, we will keep the providers abreast of the requirements.

Effective January 1, 2006, providers will start using a producer's System ID, rather than their social security number. The System ID can be found on the upper right hand side of the license. The System ID is 7 digits, however, the provider should enter two leading zero's when submitting the credits (example; 0123456 would be entered as 000123456). On our website, we have a producer locator lookup. The producer or provider can enter "minimal" criteria to obtain this information. Access our website at www.michigan.gov/ofis scroll down to *Featured Services* and select Insurance Producer, Adjuster, Counselor, and Solicitor Locator.

Another process change I'm looking forward to announce is the online credit banking. I hope to have this available in March, 2006.

I would like to remind providers that all approved courses expire two years after the approval date. Michigan will start emailing the providers advance course expiration notices. Please make sure your email address is up-to-date with our office. You may email me with name, phone number, address, or email address changes.

A few more reminders are you must report the actual course completion date that is written on the certificate of completion when using EasyBank. Providers who don't use EasyBank certificates must provide a sample of their own certificate for approval that includes the date the provider will report the credit hours on behalf of the licensee. Also, do not distribute blank certificates and ask the producer to fill in their name, address, etc. All certificates must be completely filled out by the provider.

Finally, to help avoid penalties issued by our office, self-study providers should establish processes to inform students of the self-study course expiration date. Allowing the materials to be sent to the student with a 365-day expiration date, is causing reporting problems. Also, providers may have students sign an affidavit if he/she does not require the course for insurance continuing education and maintain the signed form in the student's file.

I highly recommend you visit our website at www.michigan.gov/ofis, select licensing, then select education, and review the education PE/CE frequently asked questions. These are designed to inform both the individual licensees and providers.

Thank you for your cooperation, assistance, and support. I look forward to establishing a great working relationship with you.

Tracy Lord Bishop
Education Administrator
Office of Financial and Insurance Services